



Exercise Guide for TM310 Leave Administration

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1:1 - Walkthrough – Log On To SAP



Scenario

You need to log on to the SAP training client so that you can complete course exercises.

Instructions

Use the steps and date provided below to log on to SAP in the classroom.

1. Access the SAP portal web page using the following web address:
 - a. <https://trg-mybeacon.nc.gov>
2. Enter the User ID and password that is assigned to your classroom PC.
3. Click the **Log on** button.
4. Click **Yes** to confirm the security message displayed.
5. Click on the **SAP GUI tab**.
6. Click on the training client specified by your instructor.
7. Stop when you have reached the SAP Easy Access screen.

2:1 - Instructor Demonstration - Quota Overview


PT50

Scenario


You wish to view an employee's quota balances.

Instructions

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Log on to SAP using your assigned Instructor ID.
2. Enter transaction code **PT50** in the Command field and click .
3. Complete the following fields:

Field	Value
Personnel no.	Use Employee A for your assigned student number on your datasheet

4. Press the **Enter** button.
5. Click on **All** at the bottom of the screen.
6. Listen as your instructor explains the 'all', 'current period', and 'expand' functions.
7. Click the **Absence quotas** tab.
8. Click **Expand**.
9. Review the displayed quota balances. Listen as your instructor explains the various tabs.
10. Click the  (Back) button to return to the SAP Easy Access screen.

This demonstration is complete.

2:2 - Walkthrough - Quota Overview


PT50

Scenario

An employee has requested Vacation leave. You wish to check to see if an employee has enough leave in her absence quotas to take the requested amount.

Instructions

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Enter transaction code **PT50** in the Command field and click  (Enter).
2. Complete the following fields:

Field	Value
Personnel no.	Use Employee A for your assigned student number on your datasheet.

3. Click the **All** button.
4. Click the **Absences quotas** tab.
5. Review the displayed quota balances.

Questions


Answer the following questions.

Question 1

Write down the absence quotas you encounter on the Absence quotes tab.

(**INSTRUCTOR NOTE:** these quota answers will change, just like in production.)

Vacation Leave
Sick Leave
Overtime Comp Leave
Holiday Comp Leave
Holiday Leave
Bonus Leave

-
6. Click the  (Back) button to return to the SAP Easy Access screen.

This exercise is complete.

2:3 - Exercise – Quota Adjustment – Military Training

PA61


Scenario

You need to add 80 hours for military training to an employee.


NOTE: This infotype has to be added only one time. On October 1 of each subsequent year, SAP will automatically create a new record.

Instructions


Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no.	Use the same employee assigned to you in the previous exercise. (Tiffany Lawrence should still be displayed from the previous exercise. If she is not, enter her Personnel no. and press Enter.)
Infotype	2013 (Quota Correction)
Subtype	85 (Military Leave Training)

3. Click  (**Create**).
4. Verify that the Absence quota type field displays subtype **85** (Military Leave Training).
5. Type **80** in the quota number field.
6. Verify that the **Increase generated entitlement** button is selected.
7. In the Transfer field select **Only transfer quota correction immediately**.
8. Click **Edit > Maintain text** from the menu to write an applicable note justifying the reason you are making an adjustment.
9. Click **Save**. Observe the infotype now has a notes icon displayed.
10. Click **Save** to save the infotype. The Maintain Time Data screen displays with a message that the transfer was successful. The next time time eval is run, the 80 hours will display in PT50.

NOTE: When using **PA61** to adjust a quota, be sure to pay attention to the increase, decrease, or replace option. (Do not use the replace option even though the system will allow you do to so.)

11. Click the  (Back) button to return to the SAP Easy Access screen.
12. Click the Training Center icon on the taskbar to return to the Training Center.
13. Use the **Green Check** to let the instructor know that you have completed the exercise.

This demonstration is complete.

2:4 - Walkthrough – Quota Adjustment – Advanced Leave


PA61

Scenario

You need to create an advance leave quota adjustment for an employee based on an approved request for 40 hours of vacation.

Instructions


Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no.	Use Employee B for your assigned student number on your datasheet
Infotype	2013
Subtype	31 - Advanced Leave – allowed

3. Click on the **Create** button.
4. Verify that the Absence quota type field displays subtype **31**.
5. Type **40** in the quota number field.
6. Verify that the **Increase generated entitlement** button is selected.
7. In the Transfer field select **Only transfer quota correction immediately**.
8. Click **Save**. The system displays the message that you have successfully completed the transfer.

NOTE: When using **PA61** to adjust a quota, be sure to pay attention to the increase, decrease, or replace option. (Do not use the replace option even though the system will allow you do to so.)

9. Click the  (Back) button to return to the SAP Easy Access screen.

OSC Time
Training

Course Title: *Leave Administration*
Functional Area: *Human Resources*
Sub Area: *Time*

This exercise is complete.


2:5 - Exercise – Quota Adjustment – Separation Action

PA61

Scenario

EE separated from State Employment. Vacation Quota was paid out (240 hours). Leave Administrator needs now to zero out remaining vacation quota balance.


Instructions

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no.	Use Employee A for your assigned student number on your datasheet
Infotype	2013
Subtype	10– Vacation Leave

3. Click on the **Create** button.
4. Verify that the Absence Quota type field displays Subtype 10
5. Type the number of hours was remaining from the Vacation Quota balance
6. Verify that the **Decrease generated entitlement** button is selected.
7. In the Transfer field select **Only transfer quota correction immediately**.
8. Click **Save**. The system displays the message that you have successfully completed the Transfer.

NOTE: When using **PA61** to adjust a quota, be sure to pay attention to the increase, decrease, or replace option. (Do not use the replace option even though the system will allow you to do so) Attach a note stating the reason why the Vacation Quota was zeroed out.

9. Click Edit then maintain text.
10. Click the  (Back) button to return to the SAP Easy Access screen.

This exercise is complete.


2:6 - Walkthrough – Convert CSL to CSL Tutoring – Quota Adjustment

Scenario


You need to convert an employee's 24 hours of community service leave to 36 hours of community service leave – tutoring.

Instructions

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Enter transaction code **PA61** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel number	Use Employee A for your assigned student number on your datasheet.
Infotype	2013
Subtype	65

3. Click the **Create** button.
4. Verify that the Absence quota type field displays subtype 65.
5. Type **24** in the quota number field.
6. Click the **Reduce generated entitlement** button.
7. In the Transfer field select **Only transfer quota correction immediately**.
8. Click **Save**. The system displays the message that you have successfully completed the transfer.
NOTE: When using **PA61** to adjust a quota, be sure to pay attention to the increase, decrease, or replace option. (Do not use the replace option even though the system will allow you do to so.)
9. Repeat steps above to create a **2013** quota correction for subtype **66** to add **36** hours of Community Service Leave – Tutoring.
10. Click the  (Back) button to return to the SAP Easy Access screen.

This exercise is complete.

3:1 - Walkthrough – Create FMLA Event

PTFMLA


Scenario

You need to create a FMLA event in SAP based on an approved FMLA request by an employee.

NOTE: This will be demonstrated using a simulation from the BEACON Online Help.

Instructions

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Enter transaction code **PTFMLA** in the Command field and click .
2. Complete the following fields:

Field	Value
Profile	SAP_FMLA_APP -- FMLA Approver NOTE: You will only have to do this the first time you access the PTFMLA transaction.

3. Click the **Execute** button. The FMLA Workbench is displayed.
4. Complete the following fields:

Field	Value
Personnel number	Use Employee B for your assigned student number on your datasheet

5. Press the **Enter** button.
6. Click the **Create Request** button. The Create FMLA Request screen is displayed.
7. Complete the following fields:

Field	Value
FMLA Reason	Birth
Valid from	7/1/08
Valid to	6/30/09
Certificate Provided	Select this check box


8. Click the Check Request  button.

9. Complete the following field:

Field	Value
Status	Approved

10. Press the **Enter** button.

11. Click the **Save** button.

12. Click the  (Back) button to return to the SAP Easy Access screen.

This demonstration is complete.

3:2 - Walkthrough – Apply Absences To FMLA Event


PTFMLA

Scenario


You need to apply absences to an open FMLA event.

Instructions

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Enter transaction code **PTFMLA** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel no.	Use Employee B for your assigned student number on your datasheet

3. Press the **Enter** button.
4. Click the **Absences** tab. The Assign Absences screen is displayed.
5. Click the checkbox in from of each absence that is a relevant absence in the FMLA event period.
6. Click the **Save** button.
7. Click the  (Back) button to return to the SAP Easy Access screen.

This exercise is complete.

4:1 - Walkthrough – Display Working Times


CATS_DA

Scenario

You wish to view an employee's working times in SAP.

Instructions


Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

1. Enter transaction code **CATS_DA** in the Command field and click .
2. Complete the following fields:

Field	Value
Reporting Period	Choose Current Year .
Personnel number	Use Employee B for your assigned student number on your datasheet

3. Click the **Execute** button.

Listen as your instructor describes some of the displayed fields for you.

4. Click the  (Back) button to return to the SAP Easy Access screen.

This exercise is complete.

4:2 - Instructor Demonstration – Troubleshooting Improper Leave Deduction

**CATS_DA
&
ZNCTIME**

Scenario


Employee says his leave was improperly deducted.

Troubleshooting steps:


1. CATS_DA – Display the relevant period for the employee.
2. ZNCTIME – Open a new session to display the Time Statement for the relevant period.

Instructions

Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.

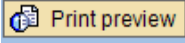

1. Enter transaction code **CATS_DA** in the Command field and click .
2. Complete the following fields:

Field	Value
Personnel number	Use Employee A for your assigned student number on your datasheet.

3. Click the **Execute** button.
4. Review the displayed work times.
5. Open a new session using the menu path **System > Create Session**.
6. Enter transaction code **ZNCTIME** in the Command field and click .
7. Complete the following fields:

Field	Value
Period	200805
Personnel number	Use Employee A for your assigned student number on your datasheet.

8. Click the **Execute** button to display the Print Time Statement pop-up box.

9. Click the  button to display the Time Statement.
10. Review the displayed results and look for leave taken to check for offsets.
11. Close the current session.
12. In the first session, click the  (Back) button to return to the SAP Easy Access screen.

This exercise is complete.

4:3 - Exercise – Troubleshooting Improper Accrual

**PT50 &
PA61**

Scenario


Employee says his accrual was incorrect. Says he has passed his 10 yr anniversary date and should be accruing at the 10 yr rate.

Trouble shooting steps:



1. PT50 – Use Quota Overview to view accrual details on the Accruals tab.
2. PA61 – Open a new session to display Time Data. Review creditable service - Infotype 552 and Infotype 41.

Instructions


Follow along with the Business Process Procedure (BPP) to complete the scenario in the system.


1. Enter transaction code **PT50** in the Command field and click .
2. Complete the following fields:


Field	Value
Personnel number	Use Employee B for your assigned student number on your datasheet

3. Click  (Enter).
4. Click the Accrual information tab.
5. Open a new session using the menu path **System > Create Session**.
6. Enter transaction code **PA61** in the Command field and click .
7. Complete the following fields:

Field	Value
Personnel number	Use Employee B for your assigned student number on your datasheet
Infotype	552


8. Click the Change icon  to view the creditable service for the employee.

NOTE: Use the  (Change) button as there is no Display button in the PA61 transaction.

9. Click the Back icon  to return to the PA61 infotype screen.

10. Repeat the steps above to view Infotype 41 to check for the original hire.

11. Close the current session.

12. In the first session, click the  (Back) button to return to the SAP Easy Access screen.

This exercise is complete.